



December 12, 2013  
Mr. John Barton  
Communications Officer  
Texas Legislative Budget Board  
1501 N. Congress, Fifth Floor  
Austin, TX 78701

RE: Agency records retention schedule approved for use

Dear Mr. Barton:

Your agency's records retention schedule is approved for use as of December 9, 2013. Your currently approved records retention schedule is available on our website at <https://www.tsl.state.tx.us/slrn/state/schedules.html>. Please ensure all old copies of the schedule are superseded with this recertified copy.

Your approved retention schedule provides you with continuing authorization to dispose of agency records according to its terms. Please note that state regulations (13 TAC §6.8) require documentation of the final disposition of records by your agency. This requirement may be met by maintaining a disposition log or other evidence of the records series titles, dates covered, volume, and date of disposition. We urge on you the importance of disposing of the records of your agency in a timely manner in accordance with the retention periods on your schedule. The destruction of any records of your agency not on your schedule requires special authorization from us.

Each agency schedule must be reviewed, updated and submitted for recertification annually for the first two years after the initial approval of the schedule and triennially thereafter. The deadline for submission of your schedule for its next recertification is the last working day of **December 2016**.

During a certification period changes may need to be made to your schedule. State regulations (13 TAC §6.4) also allow for the submission of amendments to the retention schedule as needed to keep the information in the schedule current. If you are not familiar with the amendment process, or if you have any other questions, please contact the Government Information Analyst assigned to your agency, Angela Ossar, at 512-463-6623 or [aossar@tsl.state.tx.us](mailto:aossar@tsl.state.tx.us).

Your efforts in developing a records retention schedule are appreciated. It not only helps to ensure the integrity of your recordkeeping practices, but it is also essential to the success of your records management program.

Sincerely,

Craig Kelso  
Director and State Records Administrator

Enclosure  
cc: State Auditor, State Archivist  
cc: (without enclosure) Ursula Parks

State and Local  
Records Management

P.O. Box 12927  
Austin, Texas  
78711.2927

4400 Shoal Creek Blvd.  
Austin, Texas  
78756

[www.tsl.state.tx.us](http://www.tsl.state.tx.us)

*Commission Chairman*  
Michael C. Waters

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Mark Smith

*Preserving yesterday,  
informing today,  
inspiring tomorrow.*

R01.104/10



Texas  
State Library  
and Archives  
Commission

STATE OF TEXAS

**Records Retention Schedule Certification**

2013 JUN 28 PM 1:02

LEGISLATIVE BUDGET  
BOARD

AD

**SLR 105C**

Form SLR 105 or SLR 122  
must accompany all  
submissions of this form.

**Section 1. Agency Information**

*(Submitting agencies complete this section only)*

Agency Code 104

Agency Name Legislative Budget Board

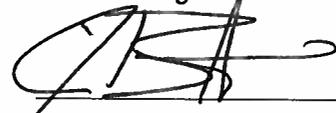
*(Check one)*

- Initial Certification - Form SLR 105
- Recertification - Form SLR 105
- Amendment - Form SLR 122

*I hereby certify that this records retention schedule was prepared in accordance with Texas Government Code, Chapter 441, Subchapter L.*

*(Check one)*

- Agency Head
- Records Management Officer

Signature 

Name *(Print or type)* John L. Barton

Date 06/28/2013

**Section 2. Approvals**

*(Submitting agencies do not write in this section)*

**State Auditor's Office**

*(For the exclusive use of the State Auditor's Office)*

Signature \_\_\_\_\_

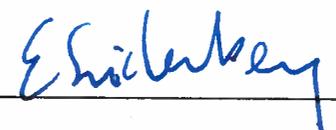
Name *(Print or type)* \_\_\_\_\_

Date \_\_\_\_\_

*Not Required at This Time*

**Texas State Library and Archives Commission**

*(For the exclusive use of the State Library and Archives Commission)*

Signature 

Name *(Print or type)* \_\_\_\_\_

Date 12-09-2013

Cert/Recert No. 5 Amendment No. \_\_\_\_\_

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## CAUTION

**A state record whose retention period has expired may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated; its destruction shall not occur until the completion of the action and the resolution of all issues that arise from it.**

**A state record whose retention period expires during any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record may not be destroyed until the completion of the action and the resolution of all issues that arise from it.**





**SLR 105**

*Form SLR 105C must accompany this form.*

Page 1 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code 104		3. Agency Name Legislative Budget Board							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival		10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total	9. Remarks			

	10000	STATE AGENCY REPORTS RECEIVED–REQUIRED	5		5				
	10010	STATE AGENCY REPORTS RECEIVED–NOT REQUIRED	AV		AV				
	10020	NON-STATE AGENCY REPORTS RECEIVED	AV		AV				
1.1.002	11002	AUDITS–Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit.	AC+7		AC+7	AC=Publication or release of final audit findings.  NOTE: The State Auditor’s Office retains any copies of its audits performed on state agencies.			

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



**SLR 105**

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Page 2 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
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			Agency	Storage	Total			

1.1.007	11007	CORRESPONDENCE—ADMINISTRATIVE—Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them.	5		5	R	<p>VITAL.</p> <p>NOTE 1: Correspondence with members of the legislature and the lieutenant governor is confidential pursuant to the Texas Government Code.</p> <p>NOTE 2: Records relating to requests of Legislative Budget Board staff for the drafting of proposed legislation or for assistance, information, advice, or opinion are not public information.</p> <p>NOTE 3: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission's minimum.</p> <p>NOTE 4: This record series and Item 1.1.008 should be used only for correspondence that is not included in or directly related to another record series on the agency's approved schedule.</p> <p>ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods.</p>		
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Retention Codes (Field 7)

AC – After Closed, Terminated, Completed, Expired, Settled  
AV – Administrative Value

CE – Calendar Year End  
FE – Fiscal Year End

LA – Life of Asset  
MO – Months

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US – Until Superseded

Archival Codes (Field 8)

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R – Review by State Archivist



**SLR 105**

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Page 3 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
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			Agency	Storage	Total			

1.1.008	11008	CORRESPONDENCE–GENERAL–Non-administrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services or projects of the agency.	2		2	SEE comment to item number 1.1.007. SEE ALSO item number 1.1.010.		
1.1.010	11010	DIRECTIVES–Any document that officially initiates, rescinds, or amends general office procedures.	US+1		US+1			

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**SLR 105**

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Page 4 of 45

## STATE OF TEXAS Records Retention Schedule

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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			
						9. Remarks		

1.1.013	11013	CALENDARS, APPOINTMENT and ITINERARY RECORDS—Calendars, appointment books or programs, and scheduling or itinerary records, purchased with state funds or maintained by staff during business hours that document appointments, itineraries and other activities of agency officials or employees.	CE+1		CE+1	R	NOTE: A record of this type purchased with personal funds, but used by a state official or employee to document his or her work activities may be a state record and subject to this retention period.  ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods.		
1.1.014	11014	LEGAL OPINIONS AND ADVICE—From agency legal counsel or the Attorney General including any requests eliciting the opinions.	AV		AV	R	NOTE: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 5 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
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1.1.020	11020	PUBLIC INFORMATION REQUESTS-NOT EXEMPTED—Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Texas Public Information Act.	AC+1		AC+1	AC=Date request fulfilled.  NOTE: Records relating to requests of the Legislative Budget Board staff for the drafting of proposed legislation or for assistance, information, advice, or opinion are not public information.		
1.1.021	11021	PUBLIC INFORMATION REQUESTS-EXEMPTED—Includes all correspondence and documentation relating to requests for records that are exempt under exceptions to the Texas Public Information Act.	AC+2		AC+2	AC=Date of notification that records are exempt.  NOTE: Records relating to requests of the Legislative Budget Board staff for the drafting of proposed legislation or for assistance, information, advice, or opinion are not public information.		
1.1.023	11023	ORGANIZATIONAL CHARTS	US		US	A VITAL.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
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**SLR 105**

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Page 6 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.024	11024	PLANS AND PLANNING RECORDS—Plans and records relating to the process of planning new or re-defined programs, services, or projects of an agency that are not included in or directly related to other records series in this schedule.	AC+5		AC+5	R	AC=Decision made to implement or not to implement as a result of planning process.  NOTE: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission's minimum.  ARCHIVES NOTE: Data processing planning records are not archival.		
1.1.026	11026	TEXAS REGISTER SUBMISSIONS—Copies of all proposed, withdrawn, emergency, and adopted rules; open meetings notices; or any other documents required by law to be submitted to the Texas Register.	AC+1		AC+1		AC=Date of publication in the Texas Register.		
1.1.027	11027A	PROPOSED LEGISLATION—Drafts of proposed legislation and related correspondence.	AC+2		AC+2		NOTE: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission's minimum.		

Retention Codes (Field 7)						Archival Codes (Field 8)			
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## STATE OF TEXAS Records Retention Schedule

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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.027	11027B	PROPOSED LEGISLATION—Drafts and working papers associated with fiscal notes prepared for proposed legislation.	PM		PM	NOTE: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission’s minimum.		
1.1.043	11043	TRAINING MATERIALS –Manuals and materials developed by the agency for training entities or individuals it regulates or serves.	US+1		US+1	US=Until superseded or no longer useful.		
1.1.048	11048	LITIGATION FILES—Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	AC+1		AC+1	R AC=As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.  ARCHIVES NOTE: Cases that set legal precedent or exhibit historical value will be evaluated by the Archives and Information Services Division, Texas State Library and Archives Commission, for archival preservation.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 8 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

1.1.053	11053	REGISTRATION LOGS—Logs or similar records used to register persons appearing before state agencies required by the Texas Government Code including quarterly reports filed with the Texas Ethics Commission.	AC		AC	AC=Report filed with the Texas Ethics Commission.		
1.1.056	11056	AMERICANS WITH DISABILITIES ACT DOCUMENTATION—Self evaluations and plans documenting compliance with the requirements of the Americans with Disabilities Act.	3		3	28 CFR 35.105(c).		

Retention Codes (Field 7)	Archival Codes (Field 8)
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**SLR 105**  
*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 9 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

1.1.057	11057	<p>TRANSITORY INFORMATION—Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency’s record-keeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an ongoing records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.</p>	AC	AC	<p>AC=Purpose of record has been fulfilled.</p> <p>NOTE: Caution should be used in assigning this records series item number to records of an agency to make certain they are not part of another records series listed in this schedule or, for records series unique to an agency, are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions. The disposal of transitory information need not be documented through destruction authorizations (Item 1.2.001) or in records disposition logs (Item 1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (Item 1.2.014).</p>	
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**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 10 of 45

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4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.1.058	11058	MEETING AGENDA AND MINUTES—Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by the Texas Government Code.	PM		PM	A	ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Archives and Information Services Division, Texas State Library and Archives Commission.		
1.1.059	11059	MEETINGS-CERTIFIED AGENDAS OR TAPE RECORDINGS OF CLOSED—Certified agendas or tape recordings of closed meetings of state boards, commissions, committees, and councils.	AC+2		AC+2		AC=The date of the meeting or completion of pending action involving the meeting, whichever is later.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 11 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

1.1.060	11060	MEETINGS-AUDIO OR VIDEOTAPES OF OPEN—Audio or videotapes of open meetings of state boards, commissions, committees, and councils.	AC+90 days		AC+90 days	AC=Official approval of written minutes of the meeting by the governing body of the agency.  NOTE: Minutes of state agencies are permanent records. Audio and videotapes are not permanent media. State agencies may not retain audio or videotapes of the meetings of governing bodies in lieu of written minutes. The proceedings of all meetings of state boards, committees, commissions, and councils must be reduced to writing.		
1.1.062	11062	MEETINGS-SUPPORTING DOCUMENTATION—Documents submitted at meetings of state boards, committees, commissions, and councils including exhibit items, documentation for agenda items, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.	2		2	A		

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**SLR 105**

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Page 12 of 45

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			Agency	Storage	Total				

1.1.063	11063	STAFF MEETING MINUTES AND NOTES Minutes or notes, and supporting documentation taken at internal agency staff meetings.	1		1			
1.1.065	11065	REPORTS AND STUDIES (NON-FISCAL)- RAW DATA—Information or data collected and compiled for the purpose of producing non-fiscal reports.	AV		AV		NOTE: Does not include source documentation used for information or data included in or directly related to another record series in this schedule.	
1.1.067	11067	REPORTS AND STUDIES (NON-FISCAL)— Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency’s programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities.	3		3	R	ARCHIVES NOTE: For agencies that have had an archival appraisal, separate this record series by each type of archival coding (i.e. “A,” “R,” or “E”).	
1.1.069	11069	REPORTS-ACTIVITY—Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.	1		1			

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**SLR 105**

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Page 13 of 45

## STATE OF TEXAS Records Retention Schedule

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1.1.070	11070	AGENCY RULES, POLICIES, AND PROCEDURES-FINAL– Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency’s programs, services, or projects.	AC+3		AC+3	R	VITAL. AC=Completion or termination of program, rules, policies or procedures.		
1.1.071	11071	AGENCY RULES, POLICIES, AND PROCEDURES-WORKING FILES– Working files used in the development of manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency’s programs, services, or projects.	AC+3		AC+3	R	VITAL AC=Completion or termination of program, rules, policies or procedures.		
1.1.072	11072	PUBLIC INFORMATION REPORTS– Reports made to the Office of the Attorney General on an agency’s Texas Public Information Act activities.	2		2				

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Archival Codes (Field 8)

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**SLR 105**  
Form SLR 105C must accompany this form.

## STATE OF TEXAS Records Retention Schedule

Page 14 of 45

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1.2.001	12001	DESTRUCTION AUTHORIZATIONS— Agency-level documents authorizing final disposition of records under a certified records retention schedule.	FE+3		FE+3			
1.2.005	12005	RECORDS RETENTION SCHEDULE (SLR 105)—Includes documentation of certification and approval and/or other forms designated by the State Records Administrator.	US		US		NOTE: Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	
1.2.006	12006	RECORDS TRANSMITTAL FORMS— Forms indicate records transferred to storage or a transfer of legal custody.	AC+2		AC+2		AC=Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission.	
1.2.008	12008	REQUEST FOR AUTHORITY TO DISPOSE OF STATE RECORDS	FE+3		FE+3		NOTE: Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	

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Page 15 of 45

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						9. Remarks		

1.2.010	12010	RECORDS DISPOSITION LOGS—Logs or similar records listing records destroyed or transferred to the Archives and Information Services Division, Texas State Library and Archives Commission, showing records series title, dates of records, and dates destroyed or transferred.	10		10			
1.3.001	13001	STATE PUBLICATIONS—Information in any format that is produced by the authority of, or at the total or partial expense of a state agency, or is required to be distributed under law by the agency and is publicly distributed.	PM		PM	NOTE: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission pursuant to the Texas Government Code.  NOTE: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission's minimum.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



**SLR 105**

*Form SLR 105C must accompany this form.*

Page 16 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

1.3.002	13002	PUBLICATION DEVELOPMENT FILES	AV		AV	R			
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Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



**SLR 105**  
Form SLR 105C must accompany this form.

Page 17 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

2.1.001	21001	PROCESSING FILES—Machine-readable files used in the creation, utilization, and updating of master files.	AC		AC	VITAL.  AC=Completion of third verification cycle, or audit completion confirming successful processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.  NOTE: Caution must be exercised to ensure that when assigning the AC retention period to agency automated processing files that the files do not fall under records series listed elsewhere.		
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Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded A – Transfer to State Archives R – Review by State Archivist



**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 18 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

2.1.002	21002	<p>MASTER FILES—Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.</p>	AC		AC	<p>VITAL.</p> <p>AC=Completion of third verification cycle, or audit completion confirming successful processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.</p> <p>NOTE: Caution must be exercised to ensure that when assigning the AC retention period to agency automated processing files that the files do not fall under records series listed elsewhere.</p>		
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Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded A – Transfer to State Archives R – Review by State Archivist



**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 19 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

2.1.007	21007	SOFTWARE PROGRAMS—Automated software applications and operating system files including job control language, program listing/source code, etc.	AC		AC	<p>VITAL.</p> <p>AC=Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read.</p> <p>13 TAC 6.94.</p> <p>NOTE: Software needed for access to electronic records must be retained for the period of time required to access the records.</p>		
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Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	LA – Life of Asset MO – Months
PM – Permanent US – Until Superseded	A – Transfer to State Archives R – Review by State Archivist



**SLR 105**  
Form SLR 105C must accompany this form.

## STATE OF TEXAS Records Retention Schedule

Page 20 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

2.1.008	21008	HARDWARE DOCUMENTATION— Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.	AC	AC	VITAL.  AC=Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read.  13 TAC 6.94.  NOTE: Software needed for access to electronic records must be retained for the period of time required to access the records.		
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Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded A – Transfer to State Archives R – Review by State Archivist



**SLR 105**

*Form SLR 105C must accompany this form.*

Page 21 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
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2.1.009	21009	<p>TECHNICAL DOCUMENTATION—Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and their timely, authorized disposition including documentation describing how a system operates and necessary for using the system such as user guides, system or sub-system definitions, system specifications, input and output specifications, and system flow charts; program descriptions and documentation such as program flowcharts, program maintenance logs, change notices, and other records that document modifications to computer programs; and data documentation necessary to access, retrieve, manipulate, and interpret data in an automated system such as a data element dictionary, file layout, code book or table, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.</p>	AC + AV		AC + AV	<p>VITAL.</p> <p>AC=Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being maintained to meet an approved retention period that require the documentation to be retrieved and read.</p> <p>13 TAC 6.94.</p> <p>NOTE: Software needed for access to electronic records must be retained for the period of time required to access the records.</p>		
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Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	A – Transfer to State Archives R – Review by State Archivist
CE – Calendar Year End FE – Fiscal Year End	PM – Permanent US – Until Superseded
LA – Life of Asset MO – Months	



**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 22 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

2.2.001	22001	SYSTEM MONITORING RECORDS— Electronic files or automated logs created to monitor computer systems such as print spool logs, console logs, tape activity logs, etc.	AV		AV			
2.2.012	22012	OUTPUT RECORDS FOR COMPUTER PRODUCTION—Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV		AV	VITAL.		
2.2.013	22013	QUALITY ASSURANCE RECORDS— Information verifying the quality of system, hardware, or software operations including records of errors or failures and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records needed as an audit trail to evaluate data accuracy.	AC		AC	AC=No longer needed as an audit trail for any records modified.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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PM – Permanent US – Until Superseded	



**SLR 105**

*Form SLR 105C must accompany this form.*

Page 23 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			
						9. Remarks		

2.2.014	22014	INTERNET COOKIES–Data resident on hard drives that makes use of user-specific information transmitted by the Web server onto the user’s computer so that the information might be available for later access by itself or other servers.	AV		AV	VITAL.  NOTE: The disposal of Internet cookies need not be documented through destruction authorization (Item 1.2.001) or in records disposition logs (Item 1.2.010), but agencies should establish procedures governing disposal of these records.		
2.2.015	22015	HISTORY FILES-WEB SITES-A record of the documents visited during an Internet session that allows users to access previously visited pages more quickly or to generate a record of usage of a state-owned computer.	AV		AV	The disposal of history files need not be documented through destruction authorization (Item 1.2.001) or in records disposition logs (Item 1.2.010), but agencies should establish procedures governing disposal of these records.		
2.2.016	22016	SOFTWARE REGISTRATIONS, WARRANTIES AND LICENSE AGREEMENTS	LA+3		LA+3	VITAL.  NOTE: Records are maintained in conjunction with the Texas Legislative Council.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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**SLR 105**

*Form SLR 105C must accompany this form.*

Page 24 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			
						9. Remarks		

3.1.001	31001	APPLICATIONS FOR EMPLOYMENT-NOT HIRED—Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	2	2	29 CFR 1602.31.		
3.1.002	31002	APPLICATIONS FOR EMPLOYMENT-HIRED— Applications, resumes, transcripts, letters of reference, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement.	AC+5	AC+5	AC=Termination of employment.		
3.1.006	31006	EMPLOYEE COUNSELING RECORDS— Notes, memoranda, or reports relating to the counseling of an employee for work-related, personal, or substance abuse problems.	AC+3	AC+3	AC=Termination of counseling.  NOTE: Usually maintained at the supervisory level except in those agencies with counseling staff.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 25 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

3.1.011	31011	EMPLOYEE'S INSURANCE RECORDS—Agency copies of information relating to the selection by employees of life, disability, health, and other types of insurance offered by the State of Texas to its employees.	AC		AC	AC=Until superseded or termination of employment.  NOTE: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for Item 3.2.001.		
3.1.012	31012	EMPLOYMENT OPPORTUNITY ANNOUNCEMENTS—Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.	2		2	29 CFR 1602.31.		
3.1.014	31014	EMPLOYMENT SELECTION RECORDS—Includes notes of interviews with candidates, questions asked of applicants, audio and videotapes of job interviews, driving record and previous injury checks, pre-employment physical examinations, pre-employment drug screening test results, polygraph examination results, and all other records that document the selection process.	2		2	VITAL.  29 CFR 1602.31.  NOTE: Does not include criminal history checks.		

**Retention Codes (Field 7)**

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**Archival Codes (Field 8)**

A – Transfer to State Archives  
R – Review by State Archivist



**SLR 105**

*Form SLR 105C must accompany this form.*

Page 26 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

3.1.018	31018	<b>GRIEVANCE RECORDS</b> Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC+2		AC+2	VITAL.  AC=Final decision on the grievance.  NOTE: Does not include formal complaints filed by an agency employee with the Equal Employment Office of the U. S. Department of Labor.		
3.1.019	31019	PERFORMANCE APPRAISALS	AC+5		AC+5	AC=Termination of Employment.  NOTE: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission's minimum.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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**SLR 105**

*Form SLR 105C must accompany this form.*

Page 27 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

3.1.020	31020	PERSONNEL CORRECTIVE ACTION DOCUMENTATION—Corrective actions are those actions which do not affect pay, status, or tenure and are imposed to correct or improve and employee’s job performance.	AC+5		AC+5	AC=Termination of Corrective Action.  NOTE: If during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under Item 3.1.021, all documentation from this series used to support disciplinary action must be retained for the minimum retention period prescribed for Item 3.1.021.		
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Retention Codes (Field 7)	Archival Codes (Field 8)
AC – After Closed, Terminated, Completed, Expired, Settled AV – Administrative Value	CE – Calendar Year End FE – Fiscal Year End LA – Life of Asset MO – Months PM – Permanent US – Until Superseded A – Transfer to State Archives R – Review by State Archivist



**SLR 105**

*Form SLR 105C must accompany this form.*

Page 28 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

3.1.021	31021	PERSONNEL DISCIPLINARY ACTION DOCUMENTATION—Disciplinary actions are those which may affect pay, status or tenure. They are imposed to discipline an employee whose conduct is harmful to the best interests of the state, the agency, or the employee work force, and for failure to improve conduct following imposition of corrective action. May include cause for demotion, suspension, or dismissal, and the reasons for failure to give written notice of resignation. May also be used to document evidence of employee self-improvement efforts, as well as favorable or unfavorable communication.	AC+5		AC+5	VITAL.  AC=Termination of employment.		
3.1.022	31022	PERSONNEL INFORMATION OR ACTION FORMS—Used to create or change information concerning an employee including pay grade, position, employee number, evaluation date, leave of absence, and termination of employment.	2		2	VITAL.  29 CFR 1602.31.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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**SLR 105**

*Form SLR 105C must accompany this form.*

Page 29 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

3.1.023	31023	POSITION/JOB DESCRIPTIONS–Job descriptions, including all associated task or skill statements, for positions in an agency.	AC+4		AC+4	VITAL. AC=Until superseded or job eliminated. 40 TAC 815.106(i).		
3.1.027	31027	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS (INDIVIDUAL)–Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing, education achievements of an employee.	AC+5		AC+5	AC=Termination of employment.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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**SLR 105**  
Form SLR 105C must accompany this form.

## STATE OF TEXAS Records Retention Schedule

Page 30 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total				

3.1.029	31029	EMPLOYMENT ELIGIBILITY, DOCUMENTATION OR VERIFICATION– Federal reporting form (INS I-9).	AC+1		AC+1	VITAL. AC=Termination of Employment. 8 CFR 274a.2(b)(2)(i)(A) and (c)(2). NOTE: Federal Regulation requires that INS I-9 forms be retained for three years from date of hire or one year after separation of the employee, whichever later. Agencies should make certain that the I-9 forms for employees who terminate from an agency less than three years from date of hire are kept for the three year retention period.		
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Retention Codes (Field 7)	Archival Codes (Field 8)
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**SLR 105**  
*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			
						9. Remarks		

3.1.031	31031	EMPLOYEE BENEFITS-OTHER THAN INSURANCE–Agency copies of information relating to the selection of available benefit options other than insurance.	AC+2		AC+2	VITAL.  AC=Until Superseded or Termination of Employment.  NOTE: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for Item 3.2.001.		
3.1.034	31034	RESUMES-UNSOLICITED–Retention period applies if an agency replies to the sender of the resume that it will be kept on file should future job openings occur.	AV		AV	NOTE: See Item 3.1.014 for resumes, whether solicited or unsolicited, that are in any way used in the employment selection process.		
3.1.038	31038	PUBLIC ACCESS OPTION FORM–Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Texas Public Information Act.	US		US	NOTE: See Item 3.3.011.		

Retention Codes (Field 7)	Archival Codes (Field 8)
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**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 32 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

3.2.001	32001	EMPLOYEE DEDUCTION AUTHORIZATIONS—Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC+4		AC+4	VITAL. AC=After termination of employment or after amendment, expiration, or termination of authorization, which ever sooner.		
3.2.002	32002	EMPLOYEE EARNING RECORDS	4		4	VITAL. 40 TAC 815.106(i).		
3.2.003	32003	FEDERAL TAX RECORDS—Includes 1099, W2, FICA and other tax records.	AC+4		AC+4	VITAL. AC=Tax due date, date the claim is filed, or date tax is paid whichever is later. 26 CFR 31.6001-1(e)(2).		
3.2.004	32004	INCOME ADJUSTMENT AUTHORIZATIONS—Used to make increases or decreases to employee’s gross pay, FICA, retirement, or in the computation of taxes.	2		2	VITAL. 26 CFR 516.6(c).		

Retention Codes (Field 7)

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MO – Months

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Archival Codes (Field 8)

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**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 33 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
			Agency	Storage	Total					

3.2.005	32005	W-4 FORMS—Employer’s copy of “Employee’s Withholding Exemption Certificate.”	AC+4		AC+4	VITAL. AC=Superseded, obsolete, or termination of employment. 26 CFR 31.6001-1(e)(2).		
3.2.006	32006	WAGE RATE TABLES	2		2	29 CFR 516.6(a)(2).		
3.2.007	32007	UNEMPLOYMENT COMPENSATION RECORDS	AC+5		AC+5	AC=Until superseded, obsolete, or termination of employment.		
3.2.008	32008	DIRECT DEPOSIT APPLICATION/AUTHORIZATIONS	US		US	VITAL.		
3.2.009	32009	STATE DEFERRED COMPENSATION RECORDS	AC+5		AC+5	AC=All accounts with a vendor or vendors for the individual participant have been closed.  NOTE: For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the <i>Benefits Coordinator Reference Manual</i> issued by the Employees Retirement System of Texas.		

**Retention Codes (Field 7)**

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R – Review by State Archivist



**SLR 105**

*Form SLR 105C must accompany this form.*

Page 34 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
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3.2.010	32010	HUMAN RESOURCE INFORMATION SYSTEM REPORTS—Includes supporting documentation.	AC+4		AC+4	VITAL. AC=Termination of employment		
3.3.004	33004	BENEFIT PLANS—Employee benefit plans such as pension; life, health, and disability insurance; deferred compensation; etc., including amendments.	US+1		US+1	26 CFR 1627.3(b)(2).		
3.3.010	33010	LABOR STATISTICS REPORTS Reports providing statistical information on labor force.	3		3			
3.3.011	33011	FORMER EMPLOYEE VERIFICATION RECORDS—Minimum information needed to verify employment, includes name, social security number, exact dates of employment, and last known address and most recent public access option form.	AC+75		AC+75	VITAL. AC=Termination of employment.  NOTE: See Item 3.1.038.		
3.3.020	33020	WORK SCHEDULES AND ASSIGNMENTS—Work, duty, shift, crew, or case schedules, rosters, or assignments.	1		1			
3.3.022	33022	TEXAS WORKFORCE COMMISSION REPORTS—Reports to the agency from the Texas Workforce Commission.	3		3			

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Archival Codes (Field 8)

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**SLR 105**  
Form SLR 105C must accompany this form.

## STATE OF TEXAS Records Retention Schedule

Page 35 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
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3.3.023	33023	REIMBURSEABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN—Requests and authorizations for travel; participation in educational programs, workshops, or college classes, or other work-related activities for which the expenses of the employee are defrayed or reimbursed.	FE+3		FE+3			
3.3.024	33024	PERSONNEL POLICIES AND PROCEDURES—Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency.	US+3		US+3			
3.3.026	33026	AGENCY STAFFING REPORTS—Any reports compiled by an agency on aspects of personnel staffing, including listing of all staff by program or name; staff hired during a month; detailed listing of employees within its organizational structure, position vacancies, analyses of turnover rates and seasonality of employment, etc.	US+3		US+3			

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**SLR 105**

*Form SLR 105C must accompany this form.*

Page 36 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.	
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3.3.027	33027	APTITUDE AND SKILLS TESTS–Aptitude or skills tests required of job applicants or of current personnel to qualify for promotions or transfers.	US+2		US+2	NOTE: One copy of each different test (different in terms of either questions or administrative procedures) should be retained for the period indicated.  26 CFR 1602.31.		
3.3.028	33028	APTITUDE AND SKILLS TESTS (TEST PAPERS)–Aptitude and skills test papers of job applicants or of current personnel taking a test to qualify for promotion or transfer.	2		2	29 CFR 1602.31.		
3.3.030	33030	TRAINING ADMINISTRATION RECORDS–Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures and other policies and procedures that govern an agency’s programs, services, or projects.	US+2		US+2	NOTE: Does not include hazardous material training records.		
3.3.031	33031	EEO REPORTS AND SUPPORTING DOCUMENTATION Includes documentation used to complete EEO reports.	3		3	29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.		

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**Archival Codes (Field 8)**

A – Transfer to State Archives  
R – Review by State Archivist



**SLR 105**

*Form SLR 105C must accompany this form.*

Page 37 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
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3.4.001	34001	ACCUMULATED LEAVE ADJUSTMENT REQUESTS—Used to create employee leave balances, to transfer leave balances when an employee transfers positions, to adjust carry-over balances on August 31, to correct errors on leave accumulation, and to close out leave accounts on separated employees.	FE+3	FE+3				
3.4.002	34002	LEAVE STATUS REPORTS—Cumulative report is issued each pay cycle and provides employee leave status for each position.	FE+3	FE+3		VITAL.		
3.4.004	34004	OVERTIME AUTHORIZATIONS	2	2				
3.4.006	34006	TIME CARDS AND TIME SHEETS	4	4		40 TAC 815.106(i).		
3.4.007	34007	TIME OFF AND/OR SICK LEAVE REQUESTS	FE + 3	FE + 3				
3.4.008	34008	SICK LEAVE POOL DOCUMENTATION—Requests submitted, approvals, number of hours transferred in and out, etc.	FE+3	FE+3				
4.1.001	41001	ACCOUNTS PAYABLE INFORMATION	FE+3	FE+3				
4.1.002	41002	BILLING DETAIL	FE+3	FE+3		NOTE: Does not include long distance telephone billing detail. See Items 5.5.001, 5.5.006, and 5.5.007.		
4.1.004	41004	ENCUMBRANCE DETAIL	FE+3	FE+3				

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A – Transfer to State Archives  
R – Review by State Archivist



**SLR 105**

*Form SLR 105C must accompany this form.*

Page 38 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
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4.1.005	41005	INVENTORY AND OTHER COST FILES-- Production, job, labor, quotes, pricing, specifications, etc.	FE+3		FE+3				
4.1.007	41007	TRANSFERS OR BUDGET REVISIONS-- Transfers or adjustment to budgets.	FE+3		FE+3				
4.2.005	42005	PURCHASE VOUCHERS--Requisitions, orders, receiving reports, invoices, or statements, change orders etc	FE+3		FE+3				
4.2.006	42006	GENERAL JOURNAL VOUCHERS	FE+3		FE+3				
4.2.007	42007	EXPENDITURE VOUCHERS--Travel, payroll, etc.	FE+3		FE+3				
4.3.003	43003	EXPENDITURE JOURNALS OR VOUCHERS	FE+3		FE+3				
4.4.001	44001	GENERAL AND SUBSIDIARY LEDGERS	FE+3		FE+3		VITAL.		
4.4.002	44002	ACCOUNTS RECEIVABLE LEDGERS	FE+3		FE+3		VITAL.		
4.4.003	44003	ACCOUNTS PAYABLE LEDGERS	FE+3		FE+3				
4.5.001	45001	WORKSHEETS FOR PREPARING FISCAL REPORTS	FE+3		FE+3				
4.5.002	45002	INTERNAL FISCAL MANAGEMENT REPORTS--Includes agency monthly budget reports.	FE+3		FE+3				

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**SLR 105**

*Form SLR 105C must accompany this form.*

Page 39 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
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						9. Remarks		

4.5.003	45003	ANNUAL FINANCIAL REPORTS–Required by the General Appropriations Act (i.e., 100 Day Report).	AC+6		AC+6	AC=September 1 of odd-numbered calendar years.  NOTE: If an agency does not produce a biennial or annual narrative report as described in Item 1.1.066 then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.		
4.5.005	45005	EXTERNAL FISCAL REPORTS–Special purpose reports (e.g., federal financial reports, salary reports, Historically Underutilized Business reports, etc.).	FE+3		FE+3			
4.5.006	45006	ANNUAL OPERATING BUDGETS	FE+3		FE+3	NOTE: Required by the General Appropriations Act.		
4.5.007	45007	USAS REPORTS-DAILY	AC		AC	AC=Receipt and reconciliation of monthly report.		

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R – Review by State Archivist



**SLR 105**

*Form SLR 105C must accompany this form.*

Page 40 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
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4.5.008	45008	USAS REPORTS-MONTHLY	AC		AC	AC=Receipt and reconciliation of annual report.		
4.5.009	45009	USAS REPORTS-ANNUAL	FE+3		FE+3			
4.6.001	46001	MONTHLY BALANCING RECORDS	FE+3		FE+3			
4.6.002	46002	RECONCILIATIONS	FE+3		FE+3			
4.7.004	47004	CAPITAL ASSET RECORDS	LA+3		LA+3			
4.7.006	47006	COMPROLLER STATEMENTS	FE+3		FE+3			
4.7.011	47011	TEXAS BUILDING AND PROCUREMENT COMMISSION (TBPC) STATEMENTS– Charge or bill statements received by agencies from the TBPC for services provided.	FE+3		FE+3			
4.7.012	47012	SIGNATURE AUTHORIZATIONS–Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	US+ FE+3		US+ FE+3			

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**SLR 105**

*Form SLR 105C must accompany this form.*

Page 41 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
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5.1.001	51001	CONTRACTS AND LEASES—Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits or publication of call for bids, accepted and rejected bids, performance bonds, contracts, purchase orders, inspections reports, and correspondence.	AC+4		AC+4		VITAL.  AC=Expiration or termination of the instrument according to its terms.		
5.1.004	51004	MAIL AND TELECOMMUNICATIONS LISTINGS—Any mailing address, telephone or fax number, or e-mail address records maintained by an agency on its employees or on entities or persons it serves.	US		US				
5.1.014	51014	OFFICE PROCEDURES—Any internally distributed manual, guidelines, or similar records that establish standard office procedures for an agency; for example, agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions.	US+1		US+1				

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**SLR 105**

*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 42 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
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5.2.008	52008	EQUIPMENT HISTORY FILE; EQUIPMENT SERVICE AGREEMENTS—Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, etc.; and service/repair logbooks, etc.	LA+3		LA+3			
5.2.010	52010	EQUIPMENT MANUALS	LA		LA			
5.2.011	52011	EQUIPMENT WARRANTIES	AC+1		AC+1		AC=Expiration of warranty.	
5.2.014	52014	INVENTORY-ANNUAL PHYSICAL—Property, equipment, supply verification.	FE+3		FE+3			
5.2.015	52015	INVENTORY, NOTICES OF EQUIPMENT REMOVED FROM	FE+3		FE+3			
5.3.007	53007	BID DOCUMENTATION—Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, and bid tabulation/evaluations.	FE+3		FE+3		NOTE: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. See Item 5.1.001.	

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**SLR 105**

*Form SLR 105C must accompany this form.*

Page 43 of 45

## STATE OF TEXAS Records Retention Schedule

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
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5.3.008	53008	PURCHASING LOGS—Log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE+3		FE+3			
5.4.001	54001	ACCIDENTS REPORTS AND ASSOCIATED DOCUMENTATION—Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the Texas Department of Insurance or maintained internally on accident frequency.	CE+5		CE+5		VITAL. 29 CFR 1904.33.  NOTE: The Texas Department of Insurance retains copies of reports sent to it for 50 years.	
5.4.002	54002	EVACUATION PLANS—Plans for evacuation of agency facilities in case of emergency.	US		US			
5.4.003	54003	INSPECTION RECORDS—Fire, safety, and other inspection records of agency facilities and equipment.	AC+3		AC+3		AC=Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency.  NOTE: Does not include inspection reports of building construction.	
5.4.004	54004	FIRE ORDERS—Order issued by the Fire Marshal to correct deficiencies in compliance with the fire code.	AC+3		AC+3		AC=Deficiency corrected.	

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**SLR 105**  
*Form SLR 105C must accompany this form.*

## STATE OF TEXAS Records Retention Schedule

Page 44 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
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5.4.011	54011	VISITOR CONTROL REGISTERS—Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.	3		3				
5.4.012	54012	SECURITY ACCESS RECORDS—Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency facilities, equipment or automated systems.	FE+3		FE+3		VITAL. AC=Until superseded, date of expiration or date of termination whichever is sooner.		
5.4.013	54013	DISASTER PREPAREDNESS AND RECOVERY PLANS	US		US		VITAL.		
5.5.001	55001	BILLING DETAIL TELECOMMUNICATIONS (OTHER THAN TEX-AN)—In addition to summary detail any accompanying detailed listing of long distance calls.	FE+3		FE+3		NOTE: See Item 5.5.006 for TEX-AN billing detail.		

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**SLR 105**  
Form SLR 105C must accompany this form.

## STATE OF TEXAS Records Retention Schedule

Page 45 of 45

2. Agency Code <b>104</b>		3. Agency Name <b>Legislative Budget Board</b>							
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
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5.5.006	55006	BILLING DETAIL-- TELECOMMUNICATIONS (TEX - AN)--In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE+3		FE+3	NOTE: The billing agency will maintain all long distance TEX-AN records and will provide each using agency its bill summary of centralized capitol complex telephone service without call detail records. For these bill summaries, see Item 4.7.011. See Item 5.5.001 for billing detail from carriers other than TEX-AN.		
5.5.007	55007	DISPUTED CALL DOCUMENTATION-- Documentation related to disputed long distance calls, including documents evidencing repayment by employees for personal long distance.	FE+3		FE+3			
5.6.009	56009	PARKING PERMITS OR ASSIGNMENTS	US		US			

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